



## Strategic Planning Session Summary

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## OHIO PLAN MANAGEMENT RESOURCES TEAM

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# CONTENTS

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Ohio Plan Management Resources Team.....	2
I. Introduction and Executive Summary.....	4
II. Expectations and Desired Results.....	7
III. Goshen Township: Current State.....	9
IV. Recent Township Accomplishments.....	11
V. SWOT Analysis and Prioritization.....	13
VI. Goshen Eulogy Exercise.....	19
VII. Why and How Statements.....	21
VIII. Short, Mid and Long Range Action Step Priorities.....	25
IX. Next Steps.....	30

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# I. INTRODUCTION AND EXECUTIVE SUMMARY

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## Introduction and Executive Summary

The Goshen Township Board of Trustees engaged Ohio Plan Management Resources, Inc. (OPMR) to facilitate a 6-Hour Strategic Planning Session for, the Township Trustees, Fiscal Officer, and the Township Executive Staff members. The purpose of the Planning Session was to build consensus regarding action steps the Township should take to bring about desired change.

The facilitation took place on Friday, November 20, 2020 from 9:00 am to 3:30 pm and was conducted by Michael Hinnenkamp, Executive Director of the Ohio Plan, Inc. with assistance from Teresa Nichols, Communications Assistant. The Planning Session included a variety of different group and break-out exercises and discussions, including a SWOT analysis and prioritization process. The results of which are outlined and summarized in this report.

The following participants attended the Planning Session: Trustee Chairperson Dan Hodges, Trustee Vice Chairperson Lisa Allen, Trustee Bob Hausermann, Fiscal Officer Laura Engled, Township Administrator/Fire Chief Steve Pegram, Police Chief Bob Rose, Assistant Fire Chief Ed Myers, Planning and Zoning Director Harry Holbert, Service Director Chad Meadow and HR Director Cheryl Allgeyer.

## Scope of Services

The facilitation focused on the following objectives:

### Process/Objectives:

- Provide an overview and the value of the Strategic Planning and Community Visioning process for local governments and Goshen Township.
- Review the 2017 Strategic Plan, completed for the Township by Strategic Community Partners, with a focus on accomplished items and remaining and new objectives.
- Conduct a self-appraisal of the current state of the Township from both an internal organizational and external economic, environmental, and quality of life standpoint.
- Identify strengths, weaknesses, opportunities and threats for the Township government structure, services, programs, and staff as well as the physical, economic, and environmental characteristics of the Township.
- Conduct a Strategic Visioning and Township Mission exercise to help define what the Township wants to become and develop and identify specific strategies and actions steps necessary to achieve this mission.
- Establish and Determine Township Budget Priorities for the next 3-5 Years.

## II. EXPECTATIONS AND DESIRED RESULTS

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## Expectations and Desired Results

Participants were asked what their expectations and desired results were for the Strategic Planning Session. This section was designed to determine why Township officials were present and what would need to happen today for them to consider the session worthwhile.

The following comments were made regarding expectations and what they hoped to achieve during the session:

- ❖ The articulation of realistic goals and objectives for the Township that:
  - Provide a guide and “road map” for Township decisions
  - Addressed current and future infrastructure needs
  - Serve as a Living/Working Document
  - Reflect our Community
  - Are:
    - Effective
    - Affordable
    - Implementable
    - Progressive
    - Properly Sequenced



### III. GOSHEN TOWNSHIP: CURRENT STATE

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## Goshen Township : Current State

Participants were asked to analyze the current state of Goshen Township. A list of components that currently make up Goshen Township were presented, and participants were asked as a group to rank whether they believed the Township was *below*, *at*, or *above* where they wished to be as a Township.

The following chart summarizes the majority in each category with an “x” and by highlighting the category.

Component	Below	At	Above
Ability to Attract New Residents	X		
Ability to Attract New Businesses	X		
Services			X
Elected Officials			X
Staff			X
Economy	X		
Housing	X		
Schools			X
Parks and Recreation		X	
Infrastructure	X		

## IV. RECENT TOWNSHIP ACCOMPLISHMENTS

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## Recent Township Accomplishments

The following were listed as the top accomplishments the Township achieved over the last 5 years:

- Township Leadership
  - Elected
  - Staff
- Improvements to the Fire Department
- Improvements to the Police Department
- HR Department/Actions
- Quality of Newly Hired Township Staff (All Departments)
- Infrastructure Grant (Road Improvements)
- Communications and Public Relations with the Community
- Passage of Levies
- Fleet Improvements
- Inter-Departmental and Inter-Agency Collaboration
- General Support and Community Consensus

## V. SWOT ANALYSIS AND PRIORITIZATION

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## **SWOT Analysis**

A SWOT Analysis process was conducted with the participants. This commonly used process identifies an organizations strengths, weaknesses, opportunities, and threats. Examples of SWOT Analysis were presented and reviewed for the group. The following SWOT Analysis categories and description for each were outlined:

### **❖ Strengths:**

- Things the Township Does Well
- Qualities that Separate Goshen from Other Communities
- Unique Internal Resources or Physical Characteristics
- Tangible Assets, Property or Facilities
- Reason People Would Chose to live in Goshen

### **❖ Weaknesses:**

- Things the Township Lacks or Does Poorly
- Reasons People Do Not Want to Live in Goshen
- Resource Limitations
- External Factors

### **❖ Opportunities**

- Things you can capitalize on that will improve the Township
- Emerging Trends
- Economic Trends
- Converting Weaknesses to Opportunities

### **❖ Threats**

- Emerging Trends
- Economic Trends
- Changing Resident's Attitude Towards what is Important to Them

The participants were grouped into two smaller discussion teams and asked to brainstorm Strengths, Weaknesses, Opportunities and Threats for both “Physical Township” characteristics and “Township Services, Programs, Structure and Staff” characteristics. The following lists of characteristics were compiled by the teams:

**Strengths:**

Physical Township	Services, Programs Structure and Staff
<ul style="list-style-type: none"> <li>▪ Open Spaces</li> <li>▪ Schools</li> <li>▪ Sense of Community</li> <li>▪ Cemeteries</li> <li>▪ Location</li> <li>▪ Rural/Suburban Character</li> <li>▪ Low Taxes</li> <li>▪ Low Density</li> <li>▪ Parks</li> <li>▪ Diversity</li> <li>▪ Mom and Pop Community</li> <li>▪ Community Support</li> <li>▪ Infrastructure in Progress</li> </ul>	<ul style="list-style-type: none"> <li>▪ Staff</li> <li>▪ Training</li> <li>▪ Facilities</li> <li>▪ Fleet</li> <li>▪ Growing Departments</li> <li>▪ Community Focus</li> <li>▪ Public Relations</li> <li>▪ Emergency Services</li> <li>▪ County Relationship</li> <li>▪ Neighboring Community Relations</li> <li>▪ Elected Officials Leadership</li> <li>▪ Employee Benefits</li> <li>▪ Common Goals/Unity/Pride</li> </ul>

Weaknesses:

Physical Township	Services, Programs Structure and Staff
<ul style="list-style-type: none"> <li>▪ Community Identity/Signage/Branding</li> <li>▪ Lack of Restaurants and Business Attractions</li> <li>▪ Streets/Infrastructure/Sidewalks</li> <li>▪ No Downtown</li> <li>▪ Lack of Desired Housing</li> <li>▪ Visual Appearance</li> <li>▪ Illegal Dump</li> <li>▪ Unrealistic Property Values</li> <li>▪ Backward Reputation</li> <li>▪ Lack Proximity to Highway</li> </ul>	<ul style="list-style-type: none"> <li>▪ Lack Adequate Staff/Growth</li> <li>▪ Infrastructure</li> <li>▪ Budget/Wages</li> <li>▪ Not Competitive with Other Communities</li> <li>▪ Branding /Marketing</li> <li>▪ Not Sticking to Strategic Plan</li> <li>▪ Reactive</li> <li>▪ Facilities</li> </ul>

Opportunities:

Physical Township	Services, Programs Structure and Staff
<ul style="list-style-type: none"> <li>▪ Available Land</li> <li>▪ Economic Development/New Business</li> <li>▪ New Residential Development</li> <li>▪ Attract Working Class</li> </ul>	<ul style="list-style-type: none"> <li>▪ Increase/Improve Staffing</li> <li>▪ Succession Planning</li> <li>▪ Technology Improvements</li> <li>▪ Branding/Identity</li> <li>▪ Increasing Revenue</li> <li>▪ COVID Relief</li> <li>▪ Grants</li> <li>▪ BWC Rebates</li> </ul>



Threats:

Physical Township	Services, Programs Structure and Staff
<ul style="list-style-type: none"> <li>▪ County/Afton</li> <li>▪ Lack of Community Income/Economy due to COVID</li> <li>▪ Competition for Grants</li> <li>▪ Lack of Diverse Housing – Rent/Own</li> <li>▪ State and County Division of Funds</li> <li>▪ Lack of Community Attractions</li> <li>▪ Rising Taxes</li> <li>▪ Distressed Properties</li> <li>▪ Infrastructure Needs</li> <li>▪ Other Communities Promotional Efforts</li> <li>▪ Community Perception</li> </ul>	<ul style="list-style-type: none"> <li>▪ Quality Elected Officials</li> <li>▪ Losing Talented Staff/Personnel</li> <li>▪ Lack of Staff Applicants/Competition</li> <li>▪ Budget Limitations</li> <li>▪ Unions</li> <li>▪ Not Thinking Ahead/Future Ramifications</li> <li>▪ Injury/Illness to Elected or Staff Personnel</li> <li>▪ Sunshine Laws/Violation</li> <li>▪ Ethics/Customer Service</li> <li>▪ Time Management Distractions</li> <li>▪ Lack of Planning Process</li> </ul>

## SWOT Analysis Prioritization

The entire group of participants then engaged in a prioritization process. The following represents the completed prioritized SWOT Analysis for Goshen Township.

<p><b>Strengths -Internal</b></p> <ol style="list-style-type: none"> <li>1. Staff</li> <li>2. Emergency Services</li> <li>3. Elected Officials Leadership</li> <li>4. Employee Benefits</li> <li>5. Training</li> </ol> <p><b>Strengths - External</b></p> <ol style="list-style-type: none"> <li>1. Sense of Community/Support</li> <li>2. Schools</li> <li>3. Open Spaces</li> <li>4. Low Density</li> </ol>	<p><b>Opportunities – Internal</b></p> <ol style="list-style-type: none"> <li>1. Branding/Identity</li> <li>2. Increase/Improve Staffing</li> <li>3. Succession Planning</li> <li>4. Technology Improvements</li> <li>5. Increasing Revenue</li> </ol> <p><b>Opportunities – Internal</b></p> <ol style="list-style-type: none"> <li>1. Available Land</li> <li>2. Economic Development/New Business</li> <li>3. New Residential Development</li> </ol>
<p><b>Weaknesses -Internal</b></p> <ol style="list-style-type: none"> <li>1. Budget/Wages</li> <li>2. Lack Adequate Staff/Growth</li> <li>3. Branding/Marketing</li> <li>4. Infrastructure</li> <li>5. Facilities</li> </ol> <p><b>Weaknesses – External</b></p> <ol style="list-style-type: none"> <li>1. Lack of Restaurants and Business Attractions</li> <li>2. Lack of Desired Housing</li> <li>3. Infrastructure/Traffic</li> <li>4. Community Identity/Signage/Branding</li> <li>5. Illegal Dump</li> </ol>	<p><b>Threats – Internal</b></p> <ol style="list-style-type: none"> <li>1. Lack of Adequate Budget</li> <li>2. Loss of Elected and Personnel/Talent</li> <li>3. Lack of futurist thinking</li> <li>4. Lack of proper Planning Process</li> </ol> <p><b>Threats – External</b></p> <ol style="list-style-type: none"> <li>1. Lack of Diverse Housing Choices</li> <li>2. Competition for Grants</li> <li>3. Distressed Properties</li> <li>4. Perception of Community</li> <li>5. Lack of Income/Economy due to COVID</li> </ol>

## VI. GOSHEN TOWNSHIP EULOGY

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## Goshen Township Eulogy Exercise

During this exercise, the group was asked to think forward 5-10 years and imagine that Goshen Township no longer existed. Participants were asked to list the things that were responsible for the death of the Township and what should have been done to prevent its death. The following reasons were listed and prioritized as the “cause of death” for Goshen Township:

- ❖ **Loss of Elected and Staff Leadership Team**
- ❖ **Cost of Service Demand Exceeds Budget**
- ❖ **Lack of Infrastructure Improvements/Costs**

The group then listed the steps and actions that should have been taken to prevent the death Goshen Township. The steps and actions were listed and prioritized as follows:

- ❖ **Adopt and Execute the Strategic Plan**
- ❖ **Partner with Public and Private Sector Entities**
- ❖ **Community Outreach to Keep Residents Updated and Informed**
- ❖ **Hire and Retain the Best Talent/Personnel**
- ❖ **Explore Opportunities for Joint Economic Development Zones**

## VII. WHY AND HOW STATEMENTS

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## Goshen Township - Why and How Statements

A discussion and presentation video by Simon Sinek regarding the Power of Why and the Golden Circle was shown to assist the Goshen Leadership Team with articulating their Why Statement (Vision for the Township) and their How Statement (Mission for the Township). Why and How are two parts of three that make up the “Golden Circle.” The purpose of these two statements is further defined and explained below:

### **Why Statement (Vision)**

- Provides Direction and Inspiration
  - Explains How the Township Helps People
  - The Value the Township Offers
  - What the Township Plans to Achieve
  - Township Aspirations and Goals
  - Inspirational - Direction to day-to-day work
  - Motivational – Why the Township Does What It Does

*The Long-Term Desired Change Resulting from the Township’s Work*

### **How Statement (Mission)**

- Describes What the Township Does to Achieve its Vision
  - Its Causes - Who, What, Where
  - Its Actions - What the Township Does
  - Its Impact - Change for the Better – Why

The group brainstormed words and phrases that convey the Township’s “Why?” Specifically, the group was asked to identify and brainstorm the “To...So that...” aspects of the Township’s “Why”.

### Why Statement Exercise

To:	So That:
<ul style="list-style-type: none"><li>• Lead</li><li>• Provide</li><li>• Best Service</li><li>• Listen</li><li>• Exceed</li></ul>	<ul style="list-style-type: none"><li>• Residents and Business Owner are Safe</li><li>• Residents are Proud of the Township</li><li>• Goshen Township is a Desirable Place to Live/Work</li><li>• Goshen Township is Progressive</li></ul>

Based on the Brainstorming Exercises conducted by the group regarding the Township's Why Statement, the OPMR Team recommends the following:

#### Goshen Township -- Why Statement:

***To be a leader at providing the best services So That residents and businesses are kept safe and proud to call Goshen Township home and it becomes a desirable destination for others to live, work and play.***

### How Statement Exercise:

The group brainstormed words and phrases that convey the Township's guiding principles and core values. These words articulate How the Township achieves the above Why/Vision Statement.

- ❖ Family
- ❖ Compassion
- ❖ Resourceful
- ❖ Integrity
- ❖ Listen
- ❖ Supportive

### Goshen Township - How Statement

Our residents, business owners and employees are family.

- ❖ We show compassion, listen, and offer support to all. We are resourceful and demonstrate integrity in everything we do.



## VIII. THE WHAT -- ACTION STEP PRIORITIES

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## Action Step Priorities:

The final component of the “Golden Circle” is “What.” This is what the Township does and the specific results the Township wants to accomplish to demonstrate its Why. In this portion of the Strategic Planning session the group focused on short, mid, and longer -range action step priorities that the Township needed to complete. These priorities included priorities regarding the budget, projects, and Trustee and Staff responsibilities beyond the basic, everyday items and issues. The participants were again grouped into two break-out teams for brainstorming purposes.

The action step priorities were categorized in groups as follows:

- Internal Operations and Services
- Internal Building and Grounds
- Programs and Policies
  - Internal
  - External

## Internal Operations and Services (Prioritized)

### Short Term – 1 Year

- ❖ Increase Staffing in the Police Department
- ❖ Develop Township Branding Plan
- ❖ Develop a 5 -Year Township Infrastructure Improvement and Funding Plan
- ❖ Expediate Township Permitting Process
- ❖ Enhance Communications with Residents and Business Community

### Mid- Term – 3 Years

- ❖ Increase Service Department Staff and Fleet to Pace New Residential Development

### Longer- Term – 5 Years

- ❖ Increase Support Staff for Administration

## Internal Building and Grounds (Prioritized)

### Short Term – 1 Year

- ❖ Design and Construct New Service Department Facility
- ❖ Expand and Maintain Township Fleet Plan – All Departments
- ❖ Complete Upgrades to Township IT System
- ❖ Expand Annual Street Paving Program

### Mid- Term – 3 Years

- ❖ Conduct Maintenance/Repair to Township Administration Building
- ❖ Complete Repairs and Upgrades to Sidewalk Network

### Longer- Term – 5 Years

- ❖ Expand/Develop New Township Cemetery
- ❖ Upgrade/Repair Fire/EMS Facilities

## Programs and Policies (Prioritized)

### ➤ Internal

### Short Term – 1 Year

- ❖ Initiate Amendments to Township Zoning Resolution
- ❖ Develop Employee Wage/Compensation Plan/Policy
- ❖ Update Employee Position Descriptions and Evaluation and Review Process
- ❖ Update Township Property Maintenance Code

### Mid- Term – 3 Years

- ❖ Create Employee Health and Wellness Program
- ❖ Develop Leadership Succession Plan

### Longer- Term – 5 Years

- ❖ Develop Recreation Department/Programs

## ➤ External

### Short Term – 1 Year

- ❖ Create Community Improvement Corporation (CIC)
- ❖ Prepare Township Economic Development Plan
- ❖ Create Township Signage Program to Provide Improved Identity and Directional Assistance to Vehicular Traffic
- ❖ Update the Land Use Plan
- ❖ Attract New Business/Increase Township Revenue
- ❖ Improve Relationships to Identify Grant Opportunities and Other Revenue Assistance Programs

### Mid- Term – 3 Years

- ❖ Develop Community Paramedicine Program
- ❖ Develop Leadership Succession Plan

### Longer- Term – 5 Years

### 2017 Strategic Plan - Review:

The Township engaged the firm, Strategic Community Partners (SCP) to conduct a strategic planning process in 2017. The key issues identified and major goals and objectives from the plan were reviewed with the group at the conclusion of prioritization process for the Actions Step Priorities in the current plan.

The purpose of the review was to compare the previous plan to the newly identified action steps to determine the following:

- What goals and objectives had been completed ?
- What goals and objectives were no longer a priority?
- Which of the former goals and objectives need to be added and reprioritized in the new Strategic Plan?

The group determined most key issues identified in the 2017 Plan remained central themes that were again identified as needing to be addressed in the current plan, such as:

- Revenue Enhancement and Financial Resources
- Economic Development and Branding Strategies
- Infrastructure Improvements
- Township Capital Improvement Plan

The following goals have been completed or substantial progress made:

- Implementation of New Township Zoning Code
- Promote Core Township Services

The following goals were not completed, but have been addressed in the current plan as Action Step Priorities:

- Update the Land Use Plan
- Identify Infrastructure Improvements for Future Funding

## IX. NEXT STEPS

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## Next Steps

The following next steps and general schedule were determined by the group so that the ideas and priorities generated by this Strategic Planning Session result into actionable outcomes:

1. **Communicate Report to Residents and Business Community**
  - a. The Board of Trustees will Discuss the Report and Request Community Feedback on it no later than the February 2021 Meeting of the Board.
    - i. The Township Administrator shall coordinate to ensure that notice of the report, copies of an Executive Summary or Full Report are available and the opportunity to comment is available thru:
      1. Social Media
      2. Township Web Site
      3. Distribution to Community Organizations, School District Officials and County Officials.
    - ii. The Township Administrator shall answer all questions regarding the Plan and designate the appropriate Administrative staff personnel to reply to those who provide comments and categorize comments for review by the Administration and Board of Trustees.
  - b. The Township Administrator shall highlight and identify all Action Step Priorities that have a specific line item proposed funding allocation in the proposed 2021 Final Appropriations Resolution.
  - c. The Board of Trustees shall review and consider all submitted comments and provide updates during the March 2021 Meeting of the Board and identify and review Action Step funding recommendations included in the 2021 Final Appropriations Resolution .
2. **Adoption of the 2021 Goshen Township Strategic Vision and Plan**
  - a. The Board of Trustees shall Adopt the Final Plan (based on review of comments) no later than the April 2021 Meeting of the Board.

3. Creation of Detailed Actions Plans and Schedules

- a. The Township Administrator shall coordinate with Township Department Heads, Staff, and Professional Consultants, as appropriate and necessary to develop detailed action plans and schedules to ensure implementation of all short and mid-term Action Step Priorities identified by the final adopted 2021 Goshen Township Strategic Vision and Plan.

4. Regular Plan Updates, Status Report and Final Appropriations

- a. The Board of Trustees shall schedule a regular Agenda item for each Board of Trustees Meeting and have the Township Administrator provide updates on the status of the Strategic Plan Action Step Priorities and identify all funding allocations for such initiatives in the Annual Final Appropriation Resolution.

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